

Medical Reserve Corps
Office of the Surgeon General
U.S. Department of Health and Human Services



Technical Assistance Series
***Establishing and Maintaining
Your MRC Unit's Organization***

Revised: August 2006



www.medicalreservecorps.gov

Medical Reserve Corps Technical Assistance Series



Office of the Surgeon General, U.S. Department of Health and Human Services

As part of its effort to support the growth and sustainability of **Medical Reserve Corps (MRC)** units across the United States, the MRC Program Office—headquartered in the Office of the U.S. Surgeon General—has developed a series of technical assistance documents. Each one addresses topics considered important for MRC units. The Technical Assistance Series is available at: www.medicalreservecorps.gov. Some of the topics addressed are as follows:

- **Getting Started: A Guide for Local Leaders**
Each MRC functions differently. The first step in forming a unit is to carefully evaluate your local situation. It is important to secure a broad base of support from others in your community. Identifying and acquiring resources is essential to meeting your MRC's operational needs.
- **Organizing an MRC Unit: Operational Components and the Coordinator's Role**
The coordinator's main job is matching community needs for emergency medical response and public health initiatives with local volunteer capabilities. Establishing and sustaining the unit's internal organization also is a priority.
- **Coordinating With Your Local Response Partners**
MRC units supplement a community's existing emergency medical response capabilities and public health infrastructure. Coordinating with local response partners is critical, as is developing and nurturing a broad network of partners. Conducting exercises with response partners will be necessary, as will close communications during and after an emergency or engagement.
- **Developing Volunteer Relationships and Capabilities**
Developing volunteer capabilities is a key mandate for every MRC unit. The process begins by advertising your MRC unit to the community. As volunteers are screened and matched with existing needs, they must be informed of any risks associated with their MRC activities. They also will require additional training.
- **Establishing and Maintaining Your MRC Unit's Organization**
A well-run organization is the foundation for every successful MRC unit. Information must be tracked and updated for volunteers and local partners. Policies must be established and followed. Operating funds must be solicited, along with leveraged public- and private-sector resources. Planning—strategically, financially, and operationally—is an essential, ongoing function of the MRC unit's administrators.
- **Special Topics**
Some of the more complex aspects of operating an MRC unit are related to differences in local laws and the evolving technical nature of the MRC's work. For example, legal liability is something every unit member should know about. Another special topic of interest to MRC units is sustainability. Special publications address these and other emerging topics.
- **Action Steps Checklist**
Each subtopic in this publication features suggested action items that can be found at the end of each section.



The **Medical Reserve Corps** program is sponsored by the U.S. Surgeon General's Office in cooperation with the White House's **USA Freedom Corps** and the Department of Homeland Security's **Citizen Corps**.





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The information in this publication is intended as a general guide to establishing and operating a Medical Reserve Corps unit. The MRC Program Office encourages communities to consider alternative approaches that may offer a better fit for their local circumstances, resources, and needs. The MRC Program Office welcomes learning from these successes.

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MRC Technical Assistance Series
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Establishing and Maintaining Your MRC Unit's Organization

Key Activities

The information on starting a Medical Reserve Corps (MRC) unit in this publication is intended to support the following ongoing efforts:

1. **Developing a roadmap for your unit** based on the identified role of your MRC unit in the community.
2. **Developing and maintaining information tracking systems** to retrieve information critical to sustaining your MRC long term.
3. **Establishing and clarifying policies and procedures** so your MRC volunteers know what is expected of them and so they can be utilized with minimal risk of harm and legal liability.
4. **Planning and revisiting strategic, financial, and operational objectives** to measure effectiveness and progress, communicate success to vested constituents, and re-chart your MRC unit's course in response to changes in your operating environment.
5. **Ensuring long-term sustainability of your MRC unit** by considering broadening your mission and community involvement and securing additional resources necessary to run your organization over the long term.

Introduction

As you devote substantial time and resources to external coordination and volunteer relations, it is also important to maintain a viable internal organization for your Medical Reserve Corps (MRC) unit. Many ongoing administrative tasks will need to be completed to best serve your volunteers and response partners. A healthy, well-run organization is the foundation of every successful MRC unit.

People with prior administrative experience will be familiar with the work required to run an organization's internal operations, particularly routine activities such as facilities management, bookkeeping, and recordkeeping. Rather than including topics that many MRC administrators might be familiar with, this publication addresses the internal organizational activities most pertinent to MRC units.

For example, information must be accurately tracked and updated as it pertains to volunteers, local contacts and partners, and specific volunteer activities. Policies must be established for volunteer utilization, monitoring the appropriate use of MRC identification cards and badges, and other issues. Ideally, these policies will be reviewed and clarified based on feedback from the field.

Similarly, ongoing strategic planning will require revisiting the priorities that currently guide your MRC's operations and vision and your basic administrative procedures. To sustain your unit for the long term, operating funds may have to be solicited and working relationships established to access or leverage necessary public- and private-sector resources.



Developing a Roadmap

As you learned in the Technical Assistance Series publication *Organizing an MRC Unit: Operational Components and the Coordinator's Role*, the purpose of your local Medical Reserve Corps (MRC) is to match community needs with volunteer resources, both for emergencies and public health initiatives. Identification of the volunteers' roles in an emergency is a key part of integrating the MRC into the local response plans.

The purpose of your local MRC is to match community needs with volunteer resources, both for emergencies and public health initiatives.

If you have not clearly defined your MRC unit's role in the community, it is important to ensure that:

- MRC volunteers are not duplicating the efforts of other response partners
- Response partners are aware of what the unit's role is and the resources it has to offer
- MRC volunteers are aware of their role and their place in the overall response structure of the local area

The activities of local MRC units can differ greatly because of the supplementary role these units are intended to play in their communities. Primarily, your MRC volunteers' contribution will be determined by your local situation and by how you and your response partners decide to collaborate.

Part of your MRC's planning process will involve identifying partners with whom your volunteers might work cooperatively. For more information on identifying and collaborating with others in your community, please see the Technical Assistance Series publication, *Coordinating with your Local Response Partners*.

Although the MRC must be integrated into local response plans, the unit cannot meet all communities' needs.

During the planning process, maintain your unit's vision, and determine:

- What you accomplished
- How you accomplished it, given your community partners' needs
- If your vision needs to reflect a different understanding of the contribution required by your community

Clearly defined roles assist MRC unit development and:

- Help prevent conflicts between volunteer-based response organizations
- Allow volunteers to effectively self-select the most suitable volunteer opportunity
- Give response partners a clear vision of how the MRC will be incorporated into the response plan, increasing the likelihood that they will support the unit's formation
- Improve risk management by giving volunteers a clearer understanding of their scope of activity during a response

Scope of Practice

Scope of practice refers to the range of activities an individual or group is permitted to perform. In many cases, this scope will be self-evident. For example, medical professionals are permitted to practice within a particular scope depending on their training.

Similarly, a human services agency may be licensed to deliver certain services as determined by law or may restrict its scope of practice to activities that support a particular mission or community focus. Restrictions on practice can be imposed from both outside and inside the MRC. It is essential for all involved to understand the limits of their particular endeavors. To ensure safety and reduce liability, ensure your volunteers do not act outside their designated role or scope of practice.

See the Technical Assistance Series publication *Getting Started: A Guide for Local Leaders* for more information on working with your response partners to determine your MRC unit's role.

Tracking and Updating Information

Information management is a large part of any administrative function in an organization.

Information management may include:

- Bookkeeping and other financial accounting tasks
- Preparing documentation for meetings and documenting the minutes
- Handling routine communication among members of the organization
- Maintaining inventories of equipment or supplies.

Perhaps your organization has volunteers willing to be responsible for some of these tasks. These activities are as essential to the success of the Medical Reserve Corps (MRC) as its primary focus on utilizing medical and health volunteers.

This publication:

1. Addresses considerations for developing a volunteer database. The volunteer database stores the information required to maintain current MRC volunteer identification cards.
2. Reviews some items to track for reporting on local medical or health engagements with your MRC volunteers.
3. Emphasizes the importance of maintaining records of local contacts, partners, and meetings.

Developing a Volunteer Database

In its simplest form, a database is a table of information called records. Your MRC unit will require a database to store volunteer contact information. There are many options for developing databases, including using a simple, computer-based spreadsheet to purchasing software specifically for volunteer management. The format you choose depends partly on your needs, available technology, and your resources.

For MRC units, tracking volunteer-related information may allow easy access to current credentialing and qualifications information, rosters of active volunteers, and records of volunteer activity that may help with soliciting operating funds and with communicating success to the larger community.

Tracking volunteer-related information is fundamental to the MRC—your MRC unit may require various databases. If so, the principles we describe here are applicable to those other data storage and retrieval needs.

Designing the Database

Carefully decide which information to collect to save time as you develop your unit. Generally, the first step is deciding how you want the information organized.

Some requirements you may want to consider when designing your database are:

- Determining what the database should do
- Determining if you have certain reports to produce
- Compiling statistics for volunteer utilization
- Contacting people quickly
- Verifying a volunteer's credentials and other qualifications

In the beginning, you may be unaware of what you will need the database for. If so, begin by listing what you know and add information as necessary. Once you know what information you need and why, you can determine what type of data to collect and the best way to organize it.

For instance, if you expect to need the names of all volunteers who have experience in nursing, you should collect information about your volunteers' experience and organize it so that you can quickly identify all individuals with that particular background or skill set. Likewise, if you need to reach volunteers living in a particular neighborhood or ZIP Code, collect these data and structure your database so you can sort by geographic location.

There may be multiple ways in which you might sort your data. The best approach is to plan for your immediate needs and consider possible future uses. It might be easier to collect and store information at first, even if you currently don't use all of it, rather than have to collect it later. Evaluating your information needs is ongoing when working with a database. You will likely be required to adjust your database design based on your changing needs.

Your database should be designed so it is:

- Relatively easy to capture and enter data
- Efficient and easy to retrieve data for specific purposes

Arrange the order of your data entry fields so that they flow logically and the important fields are readily visible. Determine how you plan to sort the data (by name, ZIP Code, profession, etc.), and ensure the data is entered consistently and accurately.

Choosing a Database Format

Database refers to the physical and organizational structure used to capture and retrieve information. Some administrators use simple paper forms, filed alphabetically or numerically. This format may serve their purposes better than electronic data entry and accessing a computer to retrieve it. However, computer-based data systems are becoming more commonly used as the cost of equipment and software decreases and as administrators become more adept with using them.

If you decide to use a computerized database, you will need a reliable system for backing up your data. Typically, electronic media are used to back up data, but paper-based printouts can be used.

MRC units have various computerized database formats; some examples are:

- Word processor documents that can be easily updated
- Spreadsheets
- Off-the-shelf database software
- Software specifically designed for managing volunteers
- Systems similar to those used by existing emergency response organizations or hospitals with whom they may be partnering

This last option is an important consideration. Ask your local response partners if it will be beneficial to set up your database using a program similar to the program they are using. If so, consult with these organizations as to how best to standardize your database so it is compatible with theirs. For example, if an emergency management agency uses its database to automatically alert volunteers, your database may have to support this requirement.

Another option for standardizing databases is to use the fields designated in the guidelines for the Emergency System for Advance Registration of Volunteer Health Professionals (ESAR-VHP). ESAR-VHP provides guidance for creating statewide databases for credentialing volunteer health professionals. Some MRC units are integrated into their states' ESAR-VHP databases, allowing them additional credentialing assistance and a mechanism for deploying volunteers to assist other areas outside their local community.

Each state has an ESAR-VHP contact in the state's department or division of public health. Using the ESAR-VHP guidelines may allow for more flexibility in working with the state to transfer volunteer resources to the areas of greatest need in a large-scale emergency.

One advantage of standardized databases is that data can be easily shared among response partners in a community and across jurisdictions, particularly during a regional or national disaster. Some volunteers may be concerned about how their personal information will be used when shared with others. Open and honest communication and consistent policies that protect volunteers' personal information can help mitigate this concern.

Each unit will determine the most appropriate and cost-effective system to meet its needs. Ask others with data collection and data management expertise for their recommendations.

Collecting Volunteer Information

Collecting volunteer information begins during the initial application and screening process. Prior to this process, you should consider which data to collect and the database's design and format.

The data you collect may consist of the volunteer's name, address, other contact information, professional skills, education, training, current certification and licensures

(including expiration dates), languages spoken, times of day available, how best to reach, etc.

Some units require applicants to have copies of certifications, licensing, and other documentation supporting their education and credentials. (For other data items to include on your application form, see the Technical Assistance Series publication *Developing Volunteer Relationships and Capabilities*.)

The format of a prospective volunteer's application should:

- Be easy to complete
- Include all data points you need to collect
- Provide for efficient data transfer from the form to your database

Where appropriate, all data entry fields should be completed by the applicant. When you add or delete fields from the database, adjust your application form accordingly.

It is important to design your database and application forms prior to data collection. This will provide for easier data entry and ensure that information will be processed promptly.

The information you collect can help track active and inactive volunteers. This information can help you evaluate volunteer data and provide a broader view of your MRC, showing your unit's overall capacities and incapacities.

Establishing an Identification System

Each unit should establish a volunteer identification system, one of the most important uses of the volunteer database. A reliable identification method allows you to properly recognize volunteers for particular engagements with response partners, particularly when they are involved in situations where identification information may be otherwise hard to access.

At a minimum, the identification (ID) card should include the volunteer's photograph, full name, an ID number, and the MRC unit name. For cross-validation, include a driver's license number or other professional license or credential number(s). The card should be produced so that it is difficult to copy or duplicate without proper authorization.

The basic ID card should identify an MRC volunteer by name and affiliation with your unit, particularly when no one else is available to identify the volunteer as a valid member of the MRC. The card may be used in various other ways, depending on local needs and available resources. Any additional information on the card will reflect these local differences.

In communities that have access to more sophisticated technology, an ID with a barcode or other digital ID number might be scanned to gain remote access to your volunteer information database.

On the display, the volunteer's record might include:

1. Information critical to volunteer utilization, such as professional experience, training, credentials, and current status (i.e., active or inactive)
2. Activities the volunteer is authorized to perform and particular sites for which the volunteer may have advance clearance or privileges (similar to when volunteer physicians have hospital privileges for officially declared emergencies)

An MRC ID card is different than a badge or other form of access control typically used at an emergency site or other health response effort. The organization responsible for directing a particular response effort typically issues this type of badge. When badges are used, the MRC volunteer presents the MRC ID card first, which functions as a preliminary means of access.

Further involvement would be determined during a particular engagement by person(s) with designated authority. An additional badge might be issued to the volunteer as a site- or engagement-specific form of ID and clearance.

The MRC unit's responsibility is to identify its volunteers clearly, accurately, and efficiently. Generally, controlling the use of MRC ID cards also will become part of the unit's administrative responsibility. Inactive or deactivated volunteers should be required to surrender their ID cards to prevent unauthorized use.

Ensure ID cards are up-to-date, particularly when there are changes in the volunteer's profile or information or when changes occur in the response system established with your response partners.

Collecting Engagement and Utilization Data

Because the MRC is a volunteer-driven initiative, collecting information about volunteer activities always is advisable. Volunteer statistics can include professional background (for medical or health volunteers), skill sets (for administrative and other support volunteers), and specialty knowledge offered by volunteer experts (e.g., lawyers, financial consultants, public relations experts, etc.)

When collecting engagement and utilization data:

- **Record the number of volunteer hours given during the year.** This information can be categorized by professional types and would show how many hours had been volunteered by each of the different volunteer types (e.g., public health workers, mental health professionals, or administrative support personnel).
- **Track of the type of activities your volunteers participate in.** This will provide a clear picture of their overall involvement and utilization. An understanding of the average volunteer's involvement can help during recruiting efforts to give prospective volunteers an accurate picture of what will be expected and the available opportunities. Activities could include meetings, trainings, training

exercises with response partners, actual deployment or utilization, post-event activities, etc.

- **Track the details of particular volunteer engagements or utilizations.**

Specifically:

- Record the circumstances of the deployment or utilization, the sequence of events from start to finish, dates and times, other organizations involved and their role(s) and participation, and all involved personnel.
- Record difficulties encountered in communication or other activation systems, effective procedures, resources consumed during the engagement, resources that could have been useful, and those that were unnecessary.
- Design a form for information to record each time—this list can remind you of which data to collect during stressful engagements when it may otherwise be difficult to remember.

This information will allow you to:

- Provide feedback during post-event feedback sessions following the utilization of MRC volunteers and in the creation of after-action reports
- Redesign ineffective procedures
- Access readily-available, specific information about an engagement for future use

Ideally, everyone involved in your MRC, including your partners, will be operating in a system of accountability in which responsibilities are clearly defined, realistic, and trackable, and this information will allow you to verify this.

Maintaining a Record of Local Contacts, Partners, and Meetings

Supplement your database with a log of phone calls, correspondence, meetings, and other exchanges with your partners. The MRC requires a substantial amount of networking. If there is no record of these contacts, a significant portion of the history of these relationships can be lost, particularly when there is a change in MRC leadership. A log of networking activities can serve as a history that can help update others on the MRC's background.

The log does not have to be extensive, but it should:

- Include dates, times, places, individuals involved and their organizational affiliation
- Note key topics for discussion along with any agreements, conflicts, or stalemate issues
- Help partners reconstruct their current status, whether in agreements or unresolved conflicts
- Function as a useful history of the MRC's progress (this can be used for training and orienting new volunteers and writing funding proposals and other reports)

Establishing and Clarifying Policies and Procedures

Each organization, including the Medical Reserve Corps (MRC), has policies and procedures that it follows to achieve its mission effectively. However, the MRC's involvement in health and medical activities requires an emphasis on certain types of policies and procedures. To most effectively achieve your unit's vision, you will need to create policies and procedures that guide the unit's development and volunteer activities.

The need for clear policies is particularly important in complex operational environments such as the MRC. Your unit's volunteers may experience difficult and risky situations, so they will need the support that comes from well-defined policies and procedures related to volunteer activation, disaster communications, safety, security, psychological well-being, use of ID cards and special-issue badges, and after-action reports.

Regardless of whether they are general statements of principle or specific rules, comprehensive procedures provide the structure that serves to actualize your policies. For example, an MRC may operate with a harm reduction policy or of informed consent for the people it serves. The procedures related to these policies provide the steps for achieving them. Training everyone to know the policies and related procedures can help your MRC function effectively as a team. More importantly, policies are intended to reduce the risk of harm and to reduce unnecessary conflict.

Establishing and communicating policies can be challenging and time consuming. It is an ongoing task, because policies cannot be incorporated and then left unmanaged. As your MRC's working situation is likely to change, it is helpful to continually revisit the policies to verify that they still reflect the working conditions and your unit's vision.

Establishing policies and later clarifying or modifying them is cyclical. You will re-evaluate them repeatedly to ensure they are the best possible. One potential source of policies for your MRC unit is your housing agency. The agency that sponsors your MRC may have existing policies related to volunteers or their functions (such as client information privacy policies). Use your housing agency's policies or develop your unit's policies to be consistent with the housing agency to the extent possible.

Policies and procedures for MRC units can be categorized as follows:

- Policies governing unit leadership (e.g., bylaws for an advisory board, if applicable)
- Application and screening procedures
- Information management policies
- Risk management policies
- Activation/deactivation procedures
- Policies and procedures regarding deployment and demobilization of the unit or of individual volunteers
- Required and recommended training for volunteers

Policies Governing Unit Leadership

Some MRC units are governed by their housing agency's staff, and other units receive guidance from individuals representing other community agencies. If your MRC unit has leadership from individuals outside the housing agency, such as an advisory board, steering committee, board of directors, or other governing body, you will want to have clear guidance for this group on how they can be most effective. It is important for members of the unit's governing body to understand their roles. Typically, these groups will write and approve their own bylaws.

At a minimum, the bylaws should include:

- Name and purpose
- Membership—size, eligibility, and requirements
- Structure—offices, election of officers, committees, voting, changes to bylaws
- Powers—the authority this group has over the MRC unit (e.g., advisory or decisionmaking)
- Meetings—how often are they held, how are they called?

Well-written bylaws can clarify the governing body's role in the MRC unit's ongoing activities and can help the group to work more efficiently. An effective advisory or governing body dedicated to the MRC's vision can accomplish much in the community. Each advisory group member can serve as an ambassador to the community and their respective organizations and agencies.

Application and Screening Procedures

One of the primary roles of an MRC unit in the community is to pre-identify and pre-credential volunteers. Pre-identifying and pre-credentialing volunteers and managing volunteer information is a significant portion of the daily routine of the MRC unit. Because the MRC volunteers' work is potentially difficult and sensitive, careful screening of volunteers is important.

As volunteers express interest in your unit, you should capture the necessary information about them to make an informed decision about whether they are an appropriate fit with your unit. Not every potential volunteer will be suitable for your unit, and it is important to have guidelines for making this decision consistently. The application process should gather information for your volunteer database. It is helpful to gather the most information you can, rather than having volunteers complete multiple forms over time.

A consistent means of accepting, processing, and reviewing these applications is essential. You must document guidelines for determining if a volunteer is suitable for your unit. Although it can be difficult to decline a volunteer's offer of service, provide a thoughtful justification for this decision consistent with your documented guidelines. See Risk Management Policies below for more information and the TA Series publication

Developing Volunteer Relationships and Capabilities for information on developing your application and screening process.

Information Management Policies

Because some of the volunteer information you collect can be sensitive (professional license numbers and other personal information), include a policy on protecting this information and with whom the information will be shared. If you need to share the volunteer's information with an outside agency for screening purposes or if you plan to include the volunteer in a statewide database, inform the volunteer of these actions. Providing the potential volunteers with a written policy of how their information will be used and how you will protect sensitive information can help the volunteer to be more comfortable about disclosing the information.

If information is collected on the individuals served by your unit in an emergency (or in a setting such as a free clinic or health screening fair) incorporate a policy protecting this information. Your local health department or other healthcare institution may have an existing policy that you could adapt for your unit's use. Your other response partners also may have requirements regarding patient information.

Volunteer Liability and Risk Management Policies

Localities are subject to different legal liability laws and standards. Seek local legal counsel to help you understand the legal and professional guidelines affecting your MRC volunteers and your organization.

Once you understand the specifics governing and restricting volunteer activities for medical and health professionals, it will be important to include these in your policies and as part of the training of your volunteers. You will likely have informed your volunteer prospects of the risks that may be associated with their work for the MRC. Once they join your team, however, you will want to help them understand the specific legal and professional standards under which they will be operating.

Liability laws protect citizens from negligent or faulty behavior on the part of individuals or organizations. Efforts to protect your MRC volunteers from liability risks also will reduce the unintended harm they might cause to those they are trying to help. Harm reduction measures and principles will become part of your policies and procedures that volunteers are trained to understand and implement.

The purpose of risk management is to identify and manage the risks faced by your program. Although the most obvious form of risk is the risk of individual or organizational liability for unintended harm, there also are other forms of risk that need to be considered in planning for your MRC unit.

The goal of the risk management policies should be to protect:

- Those you serve from harm
- Your volunteers from harm and from liability for unintended harm to others
- Your organization from liability for your volunteers' actions

- Your unit's reputation and its ability to effectively recruit, retain, and utilize volunteers

You can achieve these through a comprehensive approach to finding the best volunteers and preparing them appropriately for their roles and having a clear understanding of what legal protections are available.

Examples of policies that fit into a comprehensive approach to risk management are:

- Application and screening procedures
- Volunteer position descriptions (including scope of practice)
- Grounds for denial of a potential volunteer
- Activation/deactivation procedures
- Volunteer code of conduct
- Grounds for dismissal
- Training requirements

Volunteer Code of Conduct and Grounds for Dismissal From the Medical Reserve Corps Unit

Each MRC volunteer should understand his or her responsibilities and what constitutes appropriate behavior. While some things, like a drug and alcohol policy, may seem obvious, document all policies and procedures related to safety, managing funds, or communicating with the media so that volunteers understand clearly what is expected of them. Documented policies and procedures allow a volunteer to refer to them and it indicates that you are serious about protecting your volunteers and those you serve.

Dismissing a potential volunteer is rarely pleasant, but it may be necessary for the MRC unit's well-being. It is particularly important that a volunteer's behavior does not compromise the safety of volunteers, response partners, or community members. To dismiss a volunteer from service, it is important that the grounds for dismissal be clearly communicated in advance of the behavior. Sometimes volunteers make mistakes because they were unaware of rules and codes of conduct. It is unfair to penalize them without first allowing them to demonstrate their willingness to follow clear rules and codes of conduct.

Volunteers need to know what is considered unacceptable conduct while they perform their roles and responsibilities.

Consider the following:

- In your MRC unit, which behaviors will be considered categorically unacceptable?
- Which behaviors will merit a warning or some form of probationary period?
- Which behaviors will require a neutral third-party mediator to determine their severity?

Document answers to these considerations and include them in your training so that everyone understands the rules and what is acceptable and unacceptable behavior.

Medical Reserve Corps Volunteers in Emergency Response

Much of MRC volunteers' work in emergency response will depend on the situation—the community's needs and which resources have been affected by the emergency. Flexibility is the key to functioning in the response, but integration in the existing plans and an understanding of how response partners collaborate is important. This information will vary depending on the community, so this publication only provides an overview of some of the considerations.

Declared and Undeclared Emergencies

One of the many implications for the MRC collaborating with other community response partners is that the decision to utilize volunteers is made by a designated leader, a general agreement of the partners, or according to principles of activation documented in advance.

In emergency management, there may be declared emergency situations that have extended beyond the normal response capabilities in your community.

For example:

- A declared emergency may involve accessing resources at higher government levels: a city may call for county resources, a county may call for state resources, or a state may call for Federal resources.
- It may mean redistributing local resources, such as redirecting substantial medical capabilities to address one particular health emergency.
- It may mean supplementing existing medical and public health capabilities, which is where MRC volunteers may be involved.

An official state of emergency is usually declared by an elected official, such as a governor or a mayor, and the type of emergency may vary. It may involve a public health emergency, such as West Nile Virus or Severe Acute Respiratory Syndrome (SARS), or it may be a natural or man-made disaster. Regardless, it is important to know which agency or office will assume the lead role in responding to the situation.

The designated response leader often is the local emergency management office. Regardless, he or she will ideally be included in your local emergency response plan. The lead agency or office will coordinate the efforts among other local or state agencies. Declaration of an emergency is particularly important in determining the liability protection available to your volunteers. Some states have laws protecting volunteers that are contingent on the declaration of an emergency. Confirm that you and your volunteers know when they are protected from liability for unintended harm.

Your MRC unit's response to various local emergencies or crises will depend on your scope of practice and on the needs of your response partners. As part of the planning effort, you will learn which individuals or offices are authorized to make the declaration

of an emergency and which agencies or offices will lead in the event of such a declaration.

The policies and procedures guiding your unit's efforts and those of your response partners should be detailed in your local response plan. Furthermore, these factors and specifics should be integrated into training and exercising your MRC volunteers. This will ensure that your unit is complying with liability protection standards that require volunteer-based organizations to train their volunteers in accordance with all policies and procedures, particularly those intended to reduce the incidence of harm.

Activation and Deactivation of Volunteers

Emergencies can strain your public health system or require medical surge capacity. Conversely, some emergencies may not require medical or health volunteers. In the MRC, medical and health volunteers need to stand by to determine how a particular situation is developing and await authorization to be activated. Avoid basing your deployment decisions on information from unreliable sources.

Once a situation requires MRC utilization, volunteers will have to be notified. Different community situations may require different responses from the MRC. You should avoid situations where volunteers act based on their initiative, without authorization from their MRC unit. Provide volunteers with a written procedure for how they will be activated (including the name and/or title of the persons authorized to activate volunteers). Your activation method and a backup method (if applicable) should be tested regularly so that volunteers are familiar with the process.

It also is critical for volunteers to be notified promptly and clearly as to when their services are no longer needed. Once the need for early surge capacity support has passed, volunteers may interfere with the regular operations of their partnering organizations, which can lead to unwarranted harm.

An existing mechanism for deactivating volunteers helps the overall response effort function smoothly and safely. These specifics should be integrated into training and exercising unit plans with your MRC volunteers.

Communication and Decisionmaking Protocols

Communications systems consist of both physical and informational components. However, communication becomes a policy consideration for procedural issues, such as whom to contact, when, and how it often is necessary for information to flow through predetermined channels and in a designated sequence, particularly when this information is vital to decisionmaking.

Chain of Command

MRC units are organized according to different management models. Some models are more hierarchical, egalitarian, and formal than others. Regardless of the model your MRC favors, the leadership function must be located in the organization. Individuals will need to know when and who to follow, particularly during volunteer utilization and community emergency. This leadership is referred to as the *chain of command*. A chain

of command is a hierarchical structure with clear authority; information is passed up or down through the hierarchy.

Team members understand how authority and decisionmaking responsibilities flow through their system. In this way, all involved clearly understand his or her part in the overall process and how their part is affected by those with whom the individual will be working most closely.

The expected procedures for relaying information, decisionmaking, and giving/following orders should be outlined and included as a key component of training your MRC volunteers. When working with your response partners, identify which systems to use, make, and execute decisions. Your volunteers may have to be integrated into this system. The Incident Command System (ICS) is the accepted standard system for managing incidents so that multiple agencies can integrate smoothly into the response and the response can be scaled appropriately. Familiarity with ICS is highly recommended as a competency requirement for your unit's volunteers. There are many ICS training resources available at little or no cost.

For more information on integrating your MRC unit into a response, see the MRC Technical Assistance Series publication *Coordinating With Your Local Response Partners*.

Deployment Policies and Procedures

While the MRC serves the needs of the local community, MRC volunteers may have the opportunity to serve other communities in their state or another state. If a large-scale emergency occurs in another community, you may find that your volunteers are eager to provide their services. Although this enthusiasm is a good thing, it is important to verify that deployments are appropriate to the affected area's needs and that the volunteers can conduct their mission effectively with minimal risk.

Before considering any opportunity to deploy your volunteers outside the local area, consider the following:

- **Mission**—Is there a specific need that MRC volunteers can meet?
- **Licensure**—Will the volunteers' licenses be recognized in another state?
- **Liability**—Are the volunteers protected from liability for unintended harm?
- **Worker's Compensation**—What happens if a volunteer is injured during the deployment? How will he or she be compensated?
- **Health and Well-Being**—What steps are being taken to protect the volunteers' physical and emotional health?
- **Food, Lodging, Supplies, Transportation, and Security**—What will be provided for the volunteers, and what will they need to provide for themselves?

Volunteer deployment is dependent on the missions required to meet the needs of the affected area. Depending on which resources are available in the affected area, there

may not be many missions that require volunteer staffing. There are several existing mechanisms for out-of-state deployment of volunteers.

Some examples of these mechanisms include:

- **The Emergency Mutual Aid Compact (EMAC)**, a mutual aid agreement between states' governors to provide resources from one state to another. Some states utilize volunteers to fulfill EMAC requests, but this is dependent on several factors. To determine whether there is a role for MRC volunteers in your state's EMAC resources, contact your state Emergency Management Agency.
- **National-level partnerships** between MRC and other organizations, such as the American Red Cross. When an organization requests the assistance of MRC volunteers, the MRC Program Office will send information via E-mail to MRC unit coordinators. Individual MRC volunteers or teams of MRC volunteers may apply for deployment.
- **Deployment through Federal agencies** such as the U.S. Department of Health and Human Services or the Federal Emergency Management Agency. Similar to partnerships with organizations, when a Federal agency identifies a mission for MRC volunteers, the MRC Program Office will send the appropriate information to MRC unit coordinators so that individual volunteers or teams of volunteers may apply for deployment.

Not all of these mechanisms will be available in each jurisdiction. It is important not to deploy your MRC volunteers outside of the existing mechanisms for deployment—they may discover that they do not have a role in the response or that they are unable to effectively conduct their identified mission. The MRC unit's primary role is in your community. If there is a possibility that the volunteers will be needed in their own community, do not deploy them elsewhere.

Required and Recommended Volunteer Training

Your MRC unit's activities are one part of the larger set of activities undertaken on behalf of emergency medicine and public health responsiveness in your community. The MRC plays a specific and smaller supporting role in this case. Similarly, in the scope that your MRC is tasked to accomplish, each volunteer will only undertake a subset of these activities. Not every volunteer will be qualified to do the same MRC-related work.

Part of volunteer orientation and training is developing skill sets as needed to enhance each volunteer's responsive capabilities.

It also is important to clarify what each volunteer will be qualified to do, based on:

- Prior experience and credentials
- Additional specialty training
- Readiness due to exercising with response partners

Guidelines will have to cover the qualifications needed for each type of activity or role in the MRC. Individuals will need to understand the specific role they will play in a larger response effort and the roles they will not be permitted to fulfill.

Although there is no set curriculum of required training at the national level for MRC volunteers, you will want to determine which training is required of the volunteers in your unit so that they can effectively fulfill their roles in a response.

Basic Core Competencies

In partnership with the National Association of City and County Health Officials, the MRC Program Office has identified eight core competencies for MRC volunteers. Although these core competencies are not a requirement, they are recommended for all units because they establish a minimum baseline for volunteers that will help them function effectively. These core competencies are appropriate for all volunteers, regardless of background. Competencies for specific medical and health volunteers have not been established at this time.

The basic core competencies encourage volunteers to:

1. Describe the procedure and steps necessary for the MRC member to protect health, safety, and overall well-being of themselves, their families, the team, and the community.
2. Document that the MRC member has an existing personal and family preparedness plan.
3. Describe the chain of command (e.g., Emergency Management Systems, ICS, NIMS), the integration of the MRC, and its application to a given incident.
4. Describe the local MRC unit's role in public health and/or emergency response and its application to a given incident.
5. Describe the MRC member's communication role(s) and processes with response partners, media, general public, and others.
6. Describe the impact of an event on the mental health of the MRC member, responders, and others.
7. Demonstrate the MRC member's ability to follow procedures for assignment, activation, reporting, and deactivation.
8. Identify limits to own skills, knowledge, and abilities as they pertain to MRC role(s).

Revisiting Unit Objectives and Documenting Activities

Some planning is necessary when first starting an MRC unit, and more planning with response partners will be required as part of a larger coordinated response effort in your community. As the community evolves, MRC units will require a renewed sense of strategic priorities to navigate any complexity. Planning—strategically, financially, and

operationally—will likely be a regular part of your unit's internal administrative tasks, not an annual activity.

Establishing objectives for your unit will be important, and they should support your MRC's mission and meet your community's needs. Reporting on progress toward your objectives also will be a critical part of communicating your MRC's success to local partners and other support organizations, including funding sources.

It will be important to:

- Track key events culminating the completion of your objectives, including target and achieved dates, where appropriate.
- Record significant events that will constitute your MRC's history.
- Note the reason for any change in your MRC unit's objectives; maintain records of how the objectives were amended or abandoned.
- Note accomplishments of importance to your MRC that may not have been part of your formal plans.
- Gain access to resources; some of which may be funds, in-kind donations, volunteered expertise, shared resources with response partners, etc. This information can be used when soliciting further resources from potential funding sources and other community champions to fill the gaps in your resource needs.
- Maintain an ongoing record of all events pertinent to its execution, whether it is strategic, financial, or operational

During the first year of an MRC unit, many changes may occur, and documentation can support a collective memory as it strengthens your efforts to broadcast your MRC's successes.

Securing Long-Term Sustainability

The easiest time to maintain the Medical Reserve Corps (MRC) mission is during and immediately following an emergency, as adversity often unites a community.

Although adversity results in many positive effects of spontaneous efforts to collaborate in times of need, we can improve our response capabilities by planning ahead and implementing a response system that can be activated responsibly during an emergency.

One of the challenges faced by the MRC is ensuring that the effort is an ongoing, national volunteer movement during non-emergencies. The MRC's long-term sustainability supports emergency activation, but also contributes to the ongoing health needs of our communities. The MRC can support medical and health volunteerism during the year and in the future.

Ideally, everything you do to support coordination with local response partners, develop your volunteers' capabilities, and establish a solid internal organization will contribute to your MRC's long-term sustainability.

However, from an organizational and administrative perspective, issues key to these efforts consist of:

- Ensuring that your mission and community contribution are sufficiently broad
- Securing the resources you will need to maintain your organization over time

Diversifying Your Medical Reserve Corps Activities

It is essential to construct a mission for your MRC and ensure your mission is focused enough to match the limits of your available resources. Balance tension between your focus and expanding your MRC's relevance to its community.

To accomplish this, consider the MRC from the emergency preparedness, emergency response, and public health perspectives. Although your MRC may focus primarily on one of these, there may be needs in your community for all of them. Addressing some or all of these perspectives also can help your MRC stay connected to the ongoing, routine requirements of your community and your community's more intense undertakings. All are important ways of participating in the life of your community. Working to eliminate health disparities and preparing the community for emergencies also can help to mitigate an emergency's effects on the community's health.

There are several approaches to adopting a more diversified view of your MRC's activities. For example, you can determine ways to supplement existing preparedness, medical, or health projects.

You might connect with community preparedness, public health, or medical initiatives in your community prior to the formation of your MRC, which:

- Helps to meet crucial community needs

- Improves community preparedness for emergencies
- Helps to demonstrate responsiveness to community needs that also will enhance public perception of the MRC
- Allows your MRC to benefit from resources earmarked for these initiatives

Establishing links with vulnerable segments of the community (disability needs, groups with limited English-language proficiency, low-income communities, etc.) also may be productive, as many of these groups can be served during non-emergency periods and will have unique requirements during disasters. Public health and preparedness efforts targeted to these populations can help prepare them for an emergency and train them to be more resilient to its effects.

Another option is to position your MRC so that it can be integrated into existing organizational structures or programs, such as:

- Opportunities for students in professional schools who might need local internships
- Professional training related to emergency response or public health efforts
- Community preparedness through CERT or other Citizen Corps programs
- Activities of local professional organizations

Developing an organizational culture of responsiveness to community needs and of actively linking to these needs sends a positive message to your volunteers. It can encourage them to develop their own social network in the MRC. When volunteers—like members of any organization—develop collegial and social relationships with their peers, these relationships can strengthen volunteer commitment. This conserves and strengthens your unit's most important resources: your volunteer corps.

Your MRC activities can contribute to establishing the MRC as part of your community's shared vision for public health and emergency response. Help others in your community understand how the MRC's contribution can become part of what makes their homes, workplaces, and neighborhoods safer, healthier, and better prepared.

Leveraging Public- and Private-Sector Resources

Leveraging public- and private-sector resources is an administrative activity that involves a particular type of networking. These networking responsibilities may involve updating local officials regarding your unit's work, grant writing, and other solicitations of funds and resources.

The MRC unit coordinator or director serves as an ambassador who strengthens the unit's foundational administrative structure. Meeting and office space may need to be secured through funds or in-kind donations. Additional staff, supplies, and equipment may be needed. As always, the emphasis will remain on asking others to utilize medical and public health volunteers in a coordinated fashion.

When initially planning and forming your MRC, you may have developed a budget showing your mission's requirements, its primary objectives, and the activities necessary to achieving the objectives. Budgeting is an ongoing administrative responsibility, and constitutes a form of information that also helps others understand how you plan to operationalize your vision with fiscal responsibility.

Your best approach is to clearly define how your budget relates to your objectives, define how your objectives will achieve your mission, and ensure your mission corresponds to the funding source's mission. Most funding organizations clearly state what they fund, and do not fund, in their application guidance. Communicating with others about your resource budget and needs can strengthen your credibility and help others understand what they are contributing to and what they might be able to offer.

When soliciting grant or foundation funds, for example, you are typically asked to provide budgetary information in your application, both expenses and anticipated sources of revenue or other resources. Funding sources will want to confirm that your anticipated resource needs correspond to your proposed activities. Funding sources also may show an increased willingness to invest in a widely diversified effort. This demonstrates that others also support your idea or vision by contributing to it. Increasingly, funding sources seek community partnerships rather than single-agency initiatives. Showing that other agencies support your efforts gives funding sources concrete evidence of your partnerships.

Diversification of resources is accomplished in two principal ways:

1. **Resource streams**—Diverse resource streams refers to having as many sources of incoming resources as possible. If a particular resource is exhausted, your MRC can more easily adapt to this change without facing the disaster level that ensues when an organization loses its primary resource stream. This diversification strategy is well known to nonprofit organizations.

For example, your MRC may have been seeded with funds from a single source initially, perhaps from the Federal government or as part of a state-run program. If so, you may already have considered identifying future funding sources, particularly if the support from the first donor is for a limited time.

2. **Resource types**—Many times, support is not provided through funds. Many of your unit's needs also may be met by resource acquisition. In-kind donations can range from receiving actual goods or supplies to using someone's time and services. Some examples of resource types are as follows:

- Individuals in your community may have bookkeeping or software programming skills you need on an ongoing, part-time basis. They may be willing to offer it to you for free or at a significantly reduced cost.
- A computer or other office equipment donated by companies that have upgraded to newer machines.
- Local media may be willing to broadcast your volunteer recruiting messages for free.

- Communications professionals may be willing to develop your materials at little or no cost.

By showing funding sources, partners, and community champions what you are striving to accomplish and what you need to support these accomplishments, they may be able to help you acquire these resources.

Promoting your MRC unit's success may require multiple champions. Some of these may be paid MRC staff, particularly those who manage daily operations.

Resource acquisition may encourage:

- Those in community leadership positions to donate their time to the MRC.
- Volunteers willing to function as spokespersons for the MRC.
- Local government officials to understand how the MRC helps them achieve their visions for community well-being, to mention the MRC in public appearances, and solicit resources for the MRC.

Therefore, it is essential to update local officials of your MRC's efforts and progress and involve them in planning. Local government budgets also may be funding sources and support for your MRC.

Another method of leveraging resources is to explore how to use some of the resources your response partners have access to.

These might include:

- Funding streams designated for certain types of activities your MRC volunteers perform
- Specialty expertise in law or training
- Training opportunities your volunteers can access at little or no extra charge

A list of potential partners can be found on the MRC Web site at <http://www.medicalreservecorps.gov/PotentialPrivateFunding>. Additionally, your community may have a broad array of organizations that might serve as potential MRC unit partners. Your local Citizen Corps council also may help you with partnering and resource opportunities.

Supporting Your Cause With Evaluation Data

Most public service sectors are encouraged to demonstrate measurable outcomes. Funding sources and taxpayers are interested in knowing that their contributions have resulted in the outcomes initially planned. There may be a demand for statistics and other facts to substantiate results. Some response partners respond more positively to your clearly defined budget than your vision statement. Conversely, some operate with less structured frameworks and may be more interested in narrative information. However, most people respond well to demonstrations of responsible stewardship. It is a good idea to develop a repertoire of ways to show how your MRC is being successfully managed and utilized.

Some examples of evaluating program success include:

- **Compiling and broadcasting success stories.** Track and document the activities and accomplishments of your MRC unit. Regardless of your progress, these success stories can be used for recruitment, media coverage, and for updating local officials, partners, and other community champions. Narratives are a compact form of communicating your MRC's success and role in the community and serve as a support to more quantitative reports of success.
- **Establish objectives and plans.** Establish objectives and plans for achievement with a timeline and institute a review process to determine progress in these particular areas. The results of this review are useful for reporting unit progress to other interested parties.

Objectives can cover multiple operational areas of your MRC, including: partnering, volunteer recruitment and training, activation plans, exercises, database development, fundraising, etc.

- **Track volunteer statistics** (see the previous section on databases for more information). Access to these statistics can help support your funding requests or other support, as it demonstrates your volunteers' contributions as in-kind services to their communities.

It may be useful to know which volunteers have helped your community, in terms of expense, by multiplying their donated hours by their normal professional rates. The results should be impressive and leverage additional funds and resources.

Action Steps Checklist

The checklist of possible action steps below follows the basic outline of this particular technical assistance topic. It is important to remember that these are only suggestions. They serve as a quick reference guide to stimulate your thoughts of the complexities you may face in your Medical Reserve Corps (MRC) unit. You may choose to follow a different approach. If so, the MRC Program Office welcomes your best practices.

Introduction

- ☐ Attend carefully to your internal organizational needs, particularly as you devote substantial resources to external coordination and volunteer relations.
 - A healthy, well-run organization is the foundation of every successful MRC unit.

Developing a Roadmap

- ☐ Revisit your unit's mission and identified roles and ensure the unit is fully integrated with local response partners.
- ☐ Determine objectives that will help fulfill the unit's role.
- ☐ Determine the scope of practice for your various types of volunteers in the unit's role(s).

Tracking and Updating Information

- ☐ Determine the information you will need as you of manage your MRC unit. Set up a system to track it as easily as possible.

Developing a Volunteer Database

- ☐ Determine what you want your volunteer information database to do. Which outputs and reports will you need? Which functions must they perform?
- ☐ Design your database to include the information you will need to collect to fulfill these functions or outputs.
 - Balance between anticipating future information needs and building a system that overly exceeds your near-term needs.
- ☐ Choose a database format—paper or computer-based—that fits your needs for data entry and retrieval and your available resources.
 - Determine if your data and system will need to be compatible with your local response partners and if your state has a database system for registering volunteer health professionals your MRC unit could participate in.
- ☐ Ensure privacy of volunteer information

- ☐ Decide which data you will need to collect from prospective volunteers before you begin interviewing them.
- ☐ Design your volunteer application forms so that they are easy to complete and so it is easy to transfer their data into a computer system (if this is the chosen format).

Establishing an Identification System

- ☐ Determine if there is an existing identification system in use at the local or state level.
- ☐ Work with local response partners to determine the most useful information to include on your MRC volunteers' identification (ID) cards.
 - Collect a recent photo, full name, an ID number, and the MRC unit name, at a minimum.
 - Consider including driver's license or other professional credential ID numbers.
- ☐ Determine, with local response partners, which information to include on MRC ID cards to quickly signal a volunteer's professional training and other necessary credentials or qualifications.
- ☐ Choose a secure method of producing the card so that IDs cannot be easily made or duplicated without authorization.
- ☐ Remember not to confuse an ID card with other badges that may be used by your response partners during an emergency or other deployment.
- ☐ Update IDs to match changes in a volunteer's profile or to reflect changes in the information system used among your response partners.
- ☐ Ask for the return of IDs when volunteers are no longer active members.

Collecting Engagement and Utilization Data

- ☐ Develop a volunteer activity tracking form.
- ☐ Use this form to track the number of hours your volunteers devote to their MRC activities. Categorize these numbers by activity and professional background.
- ☐ Use this form to track of the professional backgrounds or skill sets represented by your volunteer corps.
- ☐ Develop an engagement or utilization form to help track the information you might want to consider later, when improving your system or filing an incident report.
- ☐ Use this form to track of the details of particular volunteer engagements or utilization, including exercises.
 - Note the circumstances involved in deployment or utilization, the sequence of events from start to finish, the names of other

organizations involved and their roles and actual participation, difficulties encountered regarding communication or other activation systems, effective procedures, resources consumed during the engagement, and potentially useful resources and resources that were unnecessary, etc.

- ☐ Use your engagement and utilization data during post-response feedback sessions with volunteers and response partners to improve future response efforts.

Maintaining a Record of Local Contacts, Partners, and Meetings

- ☐ Maintain a database or card file of local contacts and community response partners.
- ☐ Maintain a log or ongoing record of phone calls, correspondence, meetings, and other exchanges with local contacts.
 - Use this log to record dates, times, places, and individuals involved and their organizational affiliations, if any. Also, note key topics for discussion, agreements, conflicts, or stalemate issues.

Establishing and Clarifying Policies and Procedures

- ☐ Clarify your rules of engagement and inform all involved what conduct you expect from your MRC volunteers.

Policies Governing Unit Leadership

- ☐ Document bylaws to govern activities of the advisory board or other governing body, if applicable.

Application and Screening Procedures

- ☐ Design an application form that captures the necessary information about potential volunteers effectively.
- ☐ Choose a combination of screening procedures, document guidelines, and apply these guidelines consistently.
- ☐ Document guidelines for determining if a volunteer is suitable for the MRC unit.

Volunteer Liability and Risk Management Policies

- ☐ Research the laws in your area that govern volunteers, Good Samaritan acts, medical and health practices, and general liability.
- ☐ Seek legal counsel to determine the best policies and procedures to reduce the risk of harm and legal liability for your volunteers and your organization, given your local laws.

- ☐ Implement policies and procedures that exceed your community-set standards. Lead your community in reducing risk of harm.
- ☐ Train your volunteers to understand the importance of liability and risk reduction policies and procedures. Confirm they understand how to implement them.
- ☐ Develop a code of conduct or other documented rules regarding volunteer behavior (particularly on rules about safety and security of volunteers and those they serve) and ensure it is distributed to all volunteers.
- ☐ Determine and document behavior that would be grounds for dismissal from the MRC unit. Apply these consistently.

Communication and Decisionmaking Protocols

- ☐ Articulate and convey proper procedures for relaying information, decisionmaking, and giving/following orders. These should be based on locally recognized systems for managing emergency.
- ☐ Practice exercising communication, decisionmaking, and leadership protocols.
- ☐ Determine, with your response partners, which individuals or organizations are authorized to declare a local state of emergency and which official declaration may activate MRC volunteer utilization.
- ☐ Designate those responsible for indicating when your MRC volunteers should be utilized and when they should cease. Provide volunteers with a written description of this process.

Required and Recommended Volunteer Training

- ☐ Provide an orientation to all volunteers to familiarize them with your unit's operations, policies and procedures, and the MRC Core Competencies.
- ☐ Identify the gaps between your volunteers' current knowledge and what is needed for them to fulfill their roles in emergency response, based on your unit's role and your volunteers' scope of practice,
- ☐ Determine any other training that might assist your volunteers in performing their roles more effectively.

Revisiting Unit Objectives and Documenting Activities

- ☐ Ensure that planning—strategically, financially, and operationally—is a regular part of your unit's internal administrative tasks and culture.
- ☐ Establish objectives that support your mission and meet your community's needs. Revisit these objectives periodically to determine if they remain strategically focused.

- ☐ Maintain a record of progress toward your objectives that includes: key events, target and completion dates where appropriate, any changes in the objectives and the reasons for the changes, and the process that led to abandoning an objective before completion.
- ☐ Record accomplishments important to your MRC, even if they were not part of your formal plan. Use these accomplishments as success stories for promoting your MRC.

Securing Long-Term Sustainability

- ☐ Consider each activity of your MRC regarding its potential for supporting your unit's long-term viability. Your efforts can work together toward that objective.
- ☐ Ensure that your mission and community contribution remain sufficiently broad so that you lose relevance and vitality. Consider your unit's mission regarding public health, community preparedness, and emergency response.
 - Recognize that it is important to maintain a focus and not distribute your resources too thin.
- ☐ Develop a 3- to 5-year plan for securing resources for maintaining your organization into the future.

Diversifying Your Medical Reserve Corps Activities

- ☐ Consider public health and emergency response, regardless of whether your MRC focuses on only one.
- ☐ Involve your MRC in existing public health and emergency preparedness initiatives. Determine if your MRC can benefit from some of the resources allocated to those initiatives.
- ☐ Establish links with vulnerable segments of your community (people with disability needs, groups with limited English-language proficiency, a low-income neighborhood, etc.). These groups will have special needs during non-emergencies and emergencies.
- ☐ Consider the MRC's possible role in existing organizations (professional schools, training efforts for medical and health professionals, professional organizations, etc.).

Leveraging Public- and Private-Sector Resources

- ☐ Develop a budget that clearly specifies your needs to accomplish your objectives and which resources will be required.
- ☐ Share your budget, as appropriate, with funding sources, community champions, response partners, and others who might help provide resources.

- ☐ Diversify your resources so that you have constant support. If one resource becomes exhausted, other resources can support your unit as you secure new resources.
- ☐ Consider multiple resource types: funds, in-kind donations of goods and services, contributions of specialty knowledge, etc.
- ☐ Inform government officials of your MRC's progress. Local government funds also may be available.
- ☐ Determine if your response partners have access to resources that you need and that they can share.

Supporting Your Cause With Evaluation Data

- ☐ Develop ways of demonstrating your MRC's effective stewardship through success stories, financial statements, progress reports, volunteer statistics, etc.